Judicial Council of California

Judicial Branch Budget Committee

JUDICIAL BRANCH BUDGET COMMITTEE

MATERIALS NOVEMBER 12, 2026
VIRTUAL MEETING

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Judicial Council *of* California

JUDICIAL BRANCH BUDGET COMMITTEE
NOTICE AND AGENDA OF OPEN ELECTRONIC MEETING

November 12, 2026

1:00 p.m. – 2:00 p.m.

Public Access: https://jcc.granicus.com/player/event/5104

Open to the public (Cal. Rules of Court, rule 10.75(c) and (e)(1)).

Meeting materials for open portions of the meeting will be posted on the Judicial Branch Budget Committee webpage on the California Courts website at least three business days before the meeting.

Request for ADA accommodations should be made at least three business days before the meeting and directed to: JCCAccessCoordinator@jud.ca.gov.

Members of the public seeking to make an audio recording of the open meeting portion of the meeting must submit a written request at least two business days before the meeting. Requests can be emailed to JBBC@jud.ca.gov.

Agenda items are numbered for identification purposes only and will not necessarily be considered in the indicated order.

I. OPEN MEETING (CAL. RULES OF COURT, RULE 10.75(C)(1))

Call to Order and Roll Call

Approval of Minutes
Approve minutes of the October 14, 2026, Judicial Branch Budget Committee meeting.

II. PUBLIC COMMENT (CAL. RULES OF COURT, RULE 10.75(K))

This meeting will be conducted by electronic means. As such, the public may make comments in writing or remotely.

Written Comment
In accordance with California Rules of Court, rule 10.75(k)(1), written comments pertaining to any agenda item of a regularly noticed open meeting can be submitted up to one complete business day before the meeting. For this specific meeting, comments should be emailed to JBBC@jud.ca.gov. Only written comments received by 1:00 p.m. November 11, 2026, will be provided to advisory body members prior to the start of the meeting.

Remote Public Comment
Members of the public requesting to speak during the public comment portion of the meeting must provide the speaker's name, the name of the organization that the speaker represents if any, and the agenda item that the public comment will address. Requests to make a remote public comment must be received by 1:00 p.m. November 11, 2026, via email to JBBC@jud.ca.gov. The chair will establish speaking limits at the beginning of the public comment session. While the advisory body welcomes and encourages public comment, time may not permit all individuals requesting to speak to be heard at this meeting.

III. Discussion and Possible Action Items (Items 1–3)

Item 1
Final Adjustments for Year-End Fund Balances for Fiscal Year 2025–26 (Action Required)
Consideration of final one-time adjustments for fiscal year 2025–26 year-end fund balances for the trial courts.

Presenters: Hon. Judith K. Dulcich, Chair, Trial Court Budget Advisory Committee
Ms. Oksana Tuk, Senior Fiscal Analyst, Judicial Council Budget Services

Item 2
Increased Transcript Rate Allocations for Fiscal Year 2026–27 (Action Required)
Consideration of increased transcript rate allocations for fiscal year 2026–27.

Presenters: Hon. Judith K. Dulcich, Chair, Trial Court Budget Advisory Committee
Ms. Rose Lane, Senior Analyst, Judicial Council Leadership Support Services

Item 3
Trial Court Budget Advisory Committee Annual Agenda for 2027 (Action Required)
Consideration of the proposed Trial Court Budget Advisory Committee annual agenda for 2027.

Presenters: Hon. Judith K. Dulcich, Chair, Trial Court Budget Advisory Committee
Ms. Megan Ellis, Senior Fiscal Analyst, Judicial Council Budget Services

IV. Adjournment

Adjourn

Judicial Council *of* California

JUDICIAL BRANCH BUDGET COMMITTEE
DRAFT MINUTES OF OPEN MEETING

October 14, 2026

1:00 p.m. – 1:40 p.m.

Videoconference

Members Present: Hon. Ann C. Moorman, Chair, Hon. Maria Lucy Armendariz, Hon. Judith K. Dulcich, Hon. Michael Rhoads, Mr. Charles Johnson, Ms. Kate Bieker, and Ms. Dena Stone

Members Absent: Hon. Maria D. Hernandez, Vice-Chair, and Hon. Brad R. Hill

Others Present: Mr. Zlatko Theodorovic, Ms. Randie Chance, Ms. Fran Mueller, Ms. Angela Cowan, Mr. Steven Quinn, Ms. Oksana Tuk, and Ms. Megan Ellis

OPEN MEETING

Call to Order and Roll Call
The chair called the meeting to order at 1:00 p.m. and took roll call.

Approval of Minutes
The advisory body approved the minutes of the September 22, 2026, Judicial Branch Budget Committee (Budget Committee) meeting.

DISCUSSION AND ACTION ITEMS (ITEMS 1–2)

Item 1
Proposition 36 Allocations for Fiscal Year 2026–27 (Action Required)
Consideration of Proposition 36 allocations for fiscal year 2026–27.

Action: *The Budget Committee unanimously voted to approve the fiscal year 2026–27 allocations to support implementation of Proposition 36, as outlined in Attachment 1C, based on 50 percent non-traffic misdemeanor and felony filings and 50 percent Proposition 36 survey data. This recommendation will be considered by the Judicial Council at its business meeting on December 11, 2026.*

Item 2
Trial Court Minimum Operating and Emergency Fund Balance Policy Updates (Action Required)
Consideration of updates to the Judicial Council's trial court minimum operating and emergency fund balance policy.

Action: *The Budget Committee unanimously voted to approve the revisions to the trial court minimum operating and emergency fund balance policy, as shown in Attachment 2C. This recommendation will be considered by the Judicial Council at its business meeting on December 11, 2026.*

INFORMATION ONLY ITEMS (NO ACTION REQUIRED)

Info 1

Funding Methodology Subcommittee Annual Work Plan

Update on the Funding Methodology Subcommittee annual work plan for fiscal year 2026–27.

Action: *None Taken.*

ADJOURNMENT

There being no further business, the meeting was adjourned at 1:21 p.m.

Approved by the advisory body on enter date.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Judicial Branch Budget Committee
(Action Item)

Title: Final Adjustments for Year-End Fund Balances for Fiscal Year 2025–26

Date: 11/10/2026

Contact: Oksana Tuk, Senior Fiscal Analyst, Judicial Council Budget Services | 916-643-8027 | oksana.tuk@jud.ca.gov

Issue

The Judicial Council is required to finalize annual allocations to the trial courts by January of each fiscal year to ensure compliance with statutory limitations on the amount of reserves that courts can carry over to the next fiscal year. As the final step in this process, a one-time reduction to fiscal year (FY) 2025–26 trial court allocations is proposed for courts with fund balances that exceed the 3 percent cap.

Background

Government Code section 68502.5(c)(2)(A) requires the Judicial Council to make a preliminary allocation reduction in July and finalize those allocations each January. The final allocations are then reduced by any fund balance (reserve) amounts that exceed the statutory fund balance cap. Under Government Code section 77203(b), a trial court may carry over unexpended funds in an amount not to exceed 3 percent of the court's operating budget from the prior fiscal year.[1]

Process for Reporting Year-End Fund Balances

In July 2014, the Judicial Council approved a process, beginning in FY 2015–16, for trial courts to report the portion of their year-end fund balances that are subject to the statutory cap. Under this process:

- Trial courts submit a preliminary year-end fund balance calculation by July 15 of each fiscal year. The Judicial Council uses this information to make the preliminary allocation reductions required by statute. The courts are not required to provide the details regarding encumbrances, prepayments, and restricted revenue at this stage.
- Trial courts submit a final fund balance calculation in the fall after their financial records have been closed.
- Before February of each year, the Judicial Council's Director of Budget Services reports the final fund balance information and any resulting allocation reductions to the Judicial Council.

[1] Added as part of Senate Bill 1021 (Stats. 2012, ch. 41), later amended by Senate Bill 95 (Stats. 2019, ch. 36, § 2), effective June 27, 2019.

Adjustments for Funds Held on Behalf of the Trial Courts

The Funds Held on Behalf (FHOB) of the Trial Courts program is a Judicial Council–approved process that allows the trial courts to request that funds exceeding the 3 percent cap be used for allowable projects or expenditures benefiting those courts. When final allocations are calculated, any reserve amount above the 3 percent cap is subject to reduction unless the court has an approved FHOB request that allows those funds to be used for an eligible purpose.

The program recognizes that trial courts have limited resources available and that major investments, such as technology upgrades, facility improvements, and other multiyear projects, often cannot be funded within a single fiscal year. Through this process, courts may request that the Judicial Council hold excess funds on their behalf and authorize their use for allowable purposes, ensuring that important projects can move forward without violating the reserve cap.

Allowable projects include technology improvements or infrastructure (case management systems); court efficiency efforts (online or smart forms for court users); facilities maintenance or repair allowed under California Rules of Court, rule 10.810; and one-time expenditures such as vehicle, equipment, or furniture replacement.

Funds approved through this process are held in the Trial Court Trust Fund, and courts are reimbursed for actual expenses related to specific projects. This process provides courts with flexibility to meet operational and contractual obligations, maximize available resources, and address important needs while remaining compliant with the 3 percent fund balance cap.

For FY 2025–26, 26 trial courts submitted FHOB requests totaling $20.5 million from reserves that exceeded the fund balance cap for that fiscal year.[2] The $20.5 million in pending FHOB requests is included in the calculation of the proposed final fund balance reduction for FY 2025–26.

Final Trial Court Accounting Records for Fiscal Year 2025–26

The figures in Attachment 1A are based on the trial courts' final FY 2025–26 accounting records and were reviewed by Judicial Council Budget Services and Branch Accounting and Procurement staff.

The proposed final net reduction for FY 2025–26 is $601,000 and is contingent on approval of the associated FHOB requests. This amount reflects a total reduction of $21.1 million for fund balances above the 3 percent cap, after allowable accounting adjustments, offset by $20.5 million in pending FHOB requests.

- Column A shows each court's fund balance cap;
- Column F shows the portion of each court's FY 2025–26 fund balance subject to the cap after excluding statutorily restricted funds per Government Code section 77203(b),

[2] Fiscal Planning Subcommittee meeting materials (Oct. 21, 2026), *Trial Court Trust Fund Funds Held on Behalf of the Trial Courts for Fiscal Year 2025–26*

encumbrances consistent with state contracting processes, prepayments, and approved FHOB funds held in the Trial Court Trust Fund;
- Column G shows court fund balances exceeding the 3 percent cap totaling $20.4 million;
- Column H shows adjustments to FY 2023–24 and FY 2024–25 fund balance calculations, totaling $674,000;
- Column I shows the total FY 2025–26 reduction of $21.1 million, affecting 37 courts;
- Column J shows FY 2025–26 FHOB requests totaling $20.5 million that are pending Judicial Council approval on December 11, 2026; and
- Column K shows the resulting net reduction of $601,000 for fund balances above the 3 percent cap after accounting for FHOB requests. The reduction will be applied to trial court allocations in the January 2027 distribution.

On October 29, 2026, the Trial Court Budget Advisory Committee approved the proposed FY 2025–26 year-end fund balance reduction of $601,000.[3]

Recommendation

Approve the final FY 2025–26 year-end fund balance reduction of $601,000. This reflects a total reduction of $21.1 million for fund balances above the statutory cap, offset by $20.5 million in FHOB requests. The reduction will be applied to trial court allocations in the January 2027 distribution.

This recommendation will be considered by the Judicial Council at its business meeting on December 11, 2026.

Attachments

1. **Attachment 1A:** FY 2025–26 Final Adjustments for Year-End Fund Balances

[3] Trial Court Budget Advisory Committee meeting materials (Oct. 29, 2026), *Final Adjustments for Year-End Fund Balances for Fiscal Year 2025–26*

FY 2025–26 Final Adjustments for Year-End Fund Balances

Court	Fund Balance Cap A	FY 2025–26 Ending Fund Balance B	Encumbrance Reserves at June 30 C	Excluded Funds per GG 77203 D	Prepayments E	Fund Balance Subject to Cap[1] F (B-C-D-E)	Current Year Reduction G	Prior Year Disencumbrance H	Total Final Reduction I (G+H)	Approved FY 2025–26 FHOB[2] J	Net Reduction after FHOB (January 2027 Dist.) K (I-J)
ALAMEDA	**3,708,255**	**7,911,699**	2,915,555	2,253,766	0	**2,742,378**	0	0	**0**	**0**	**0**
ALPINE	**34,000**	**183,087**	1,101	22,081	65,227	**94,678**	60,678	0	**60,678**	**60,678**	**0**
AMADOR	**200,473**	**1,869,037**	1,528,731	149,803	137	**190,366**	0	0	**0**	**0**	**0**
BUTTE	**568,186**	**1,868,344**	502,323	601,719	6,763	**757,538**	17,984	171,369	**189,352**	**103,400**	**85,952**
CALAVERAS	**149,626**	**846,838**	85,425	323,975	312,178	**125,261**	0	23,957	**23,957**	**0**	**23,957**
COLUSA	**107,809**	**679,151**	35,831	416,232	0	**227,087**	91,712	27,566	**119,279**	**91,712**	**27,566**
CONTRA COSTA	**2,109,777**	**5,198,119**	1,567,272	3,066,641	0	**564,205**	0	0	**0**	**0**	**0**
DEL NORTE	**146,510**	**1,001,459**	382,833	430,546	0	**188,080**	38,988	2,583	**41,570**	**0**	**41,570**
EL DORADO	**385,121**	**2,005,982**	1,294,093	339,805	355,736	**16,348**	0	5,307	**5,307**	**0**	**5,307**
FRESNO	**2,595,710**	**4,846,451**	747,616	1,561,879	0	**2,536,957**	0	0	**0**	**0**	**0**
GLENN	**146,453**	**414,145**	66,673	188,299	2,583	**156,590**	0	16,381	**16,381**	**15,500**	**881**
HUMBOLDT	**327,140**	**301,519**	67,011	175,369	1,864	**57,276**	0	0	**0**	**0**	**0**
IMPERIAL	**425,306**	**1,785,605**	105,932	1,004,164	280,244	**395,265**	0	19,678	**19,678**	**0**	**19,678**
INYO	**106,123**	**431,620**	21,321	350,398	268	**59,632**	0	0	**0**	**0**	**0**
KERN	**3,166,443**	**8,416,826**	1,025,988	4,382,540	34,490	**2,973,808**	0	0	**0**	**0**	**0**
KINGS	**439,053**	**1,190,918**	83,593	350,364	315,018	**441,943**	0	4,837	**4,837**	**4,837**	**0**
LAKE	**190,492**	**1,314,426**	202,285	424,264	0	**687,876**	480,648	16,737	**497,384**	**380,588**	**116,796**
LASSEN	**128,389**	**410,600**	154,742	138,391	0	**117,467**	0	0	**0**	**0**	**0**
LOS ANGELES	**31,802,785**	**166,885,584**	73,605,555	50,743,776	1,101,717	**41,434,537**	9,631,751	0	**9,631,751**	**9,631,751**	**0**
MADERA	**500,975**	**1,595,285**	512,879	577,217	0	**505,189**	4,213	0	**4,213**	**0**	**4,213**
MARIN	**521,871**	**1,939,243**	0	993,790	64,047	**881,406**	359,535	0	**359,535**	**359,535**	**0**
MARIPOSA	**75,701**	**584,030**	41,079	69,157	166,296	**307,498**	187,937	43,860	**231,797**	**216,047**	**15,750**
MENDOCINO	**312,487**	**693,398**	22,010	309,627	0	**361,761**	49,274	0	**49,274**	**49,274**	**0**
MERCED	**717,030**	**3,999,125**	75,381	3,221,307	10,085	**692,352**	0	0	**0**	**0**	**0**
MODOC	**59,051**	**199,509**	0	72,577	587	**126,345**	67,294	0	**67,294**	**0**	**67,294**
MONO	**105,348**	**504,700**	230,333	167,176	82,002	**25,190**	0	4,017	**4,017**	**0**	**4,017**
MONTEREY	**1,004,795**	**2,937,707**	208,795	1,704,694	2,583	**1,021,635**	0	23,871	**23,871**	**23,871**	**0**
NAPA	**439,056**	**665,424**	129,642	526,920	0	**8,861**	0	0	**0**	**0**	**0**
NEVADA	**284,899**	**925,702**	0	698,322	0	**227,380**	0	0	**0**	**0**	**0**
ORANGE	**8,300,041**	**12,192,224**	42,651	7,200,709	0	**4,948,864**	0	60,290	**60,290**	**60,290**	**0**
PLACER	**995,612**	**6,220,383**	267,457	1,019,656	3,164,694	**1,768,576**	771,656	1,309	**772,964**	**772,964**	**0**
PLUMAS	**61,063**	**1,066,646**	27,104	145,257	330,955	**563,330**	502,257	10	**502,267**	**405,000**	**97,267**
RIVERSIDE	**6,745,710**	**17,033,883**	1,465,805	8,501,593	0	**7,066,484**	294,957	25,817	**320,774**	**320,774**	**0**
SACRAMENTO	**4,324,365**	**8,838,246**	1,018,610	5,009,003	0	**2,810,633**	0	1,728	**1,728**	**0**	**1,728**
SAN BENITO	**236,759**	**1,530,823**	1,322,294	77,665	0	**130,864**	0	43,989	**43,989**	**43,989**	**0**
SAN BERNARDINO	**5,754,447**	**11,964,823**	538,888	3,413,593	0	**8,012,342**	2,152,479	105,416	**2,257,895**	**2,257,895**	**0**
SAN DIEGO	**7,104,758**	**15,941,757**	133,560	9,648,630	305,110	**5,854,457**	0	0	**0**	**0**	**0**
SAN FRANCISCO	**2,767,294**	**1,243,193**	0	1,153,688	0	**89,505**	0	0	**0**	**0**	**0**
SAN JOAQUIN	**1,958,543**	**9,673,292**	1,747,780	2,792,618	548,602	**4,584,292**	2,584,233	41,516	**2,625,749**	**2,625,749**	**0**
SAN LUIS OBISPO	**737,717**	**3,438,683**	61,920	2,586,739	0	**790,024**	52,307	0	**52,307**	**52,307**	**0**
SAN MATEO	**1,823,800**	**3,413,574**	950	773,210	0	**2,639,414**	815,614	0	**815,614**	**815,000**	**614**
SANTA BARBARA	**1,200,943**	**1,141,694**	21,479	927,641	0	**192,574**	0	0	**0**	**0**	**0**
SANTA CLARA	**3,850,775**	**11,439,676**	4,957,809	2,071,763	593,701	**3,816,404**	0	29,132	**29,132**	**0**	**29,132**
SANTA CRUZ	**628,387**	**2,029,227**	362,729	1,287,755	0	**378,743**	0	0	**0**	**0**	**0**
SHASTA	**809,319**	**1,776,275**	73,797	595,445	124	**1,106,909**	297,590	0	**297,590**	**297,590**	**0**
SIERRA	**31,612**	**261,187**	3,874	8,829	161,743	**86,740**	55,128	0	**55,128**	**0**	**55,128**
SISKIYOU	**178,383**	**564,418**	20,000	376,240	1,069	**167,109**	0	0	**0**	**0**	**0**
SOLANO	**1,213,874**	**2,273,366**	18,883	1,506,578	121,838	**626,067**	0	0	**0**	**0**	**0**
SONOMA	**1,137,803**	**4,805,774**	783,805	1,912,333	673,091	**1,436,545**	296,767	1,975	**298,742**	**296,767**	**1,975**
STANISLAUS	**1,247,905**	**3,258,510**	59,935	644,657	1,085,129	**1,468,788**	220,569	315	**220,884**	**220,884**	**0**
SUTTER	**326,946**	**1,774,074**	469,846	216,476	0	**1,087,752**	760,773	33	**760,806**	**760,773**	**33**
TEHAMA	**238,724**	**1,014,941**	50,363	502,185	0	**462,394**	223,670	0	**223,670**	**223,670**	**0**
TRINITY	**91,336**	**134,087**	0	72,897	0	**61,190**	0	0	**0**	**0**	**0**
TULARE	**1,443,371**	**2,258,131**	1,035,697	537,106	384,814	**300,514**	0	2,091	**2,091**	**0**	**2,091**
TUOLUNME	**209,280**	**262,689**	31,342	162,621	0	**68,726**	0	0	**0**	**0**	**0**
VENTURA	**1,767,255**	**3,866,935**	536,603	1,188,070	0	**2,142,262**	375,007	0	**375,007**	**375,007**	**0**
YOLO	**685,905**	**1,299,737**	27,634	618,539	177,994	**475,570**	0	0	**0**	**0**	**0**
YUBA	**271,472**	**386,835**	4,357	331,292	21,163	**30,022**	0	0	**0**	**0**	**0**
TOTAL	**106,902,261**	**352,710,611**	**100,699,170**	**130,547,588**	**10,371,850**	**111,092,003**	**20,393,020**	**673,783**	**21,066,803**	**20,465,852**	**600,953**

[1] Variance in total is due to rounding.

[2] Approved TCTF FHOB requests include those requests pending before the Judicial Council at its December 11, 2026 business meeting.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Judicial Branch Budget Committee
(Action Item)

Title: Increased Transcript Rate Allocations for Fiscal Year 2026–27

Date: 11/2/2026

Contact: Rose Lane, Senior Analyst, Judicial Council Leadership Support Services | 916-643-6926 | rosemary.lane@jud.ca.gov

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Issue

Consideration of fiscal year (FY) 2026–27 allocations for the ongoing $7 million General Fund included in the Budget Act of 2026 to cover the additional costs incurred by courts associated with increased transcript rates.

Background

Government Code section 69950 establishes compensation rates for court reporters based on transcript length, calculated per 100 words. Specifically, it sets the fee for an original ribbon or printed transcript at $1.13 per 100 words, and $0.20 per 100 words for each copy purchased at the same time by the court, a party, or another purchaser of the original.

In 2021, Assembly Bill 177 (Stats. 2021, ch. 257) amended section 69950 to increase transcript fees, raising the rate for originals from $0.85 to $1.13 per 100 words. Additionally, Senate Bill 170 (Stats. 2021, ch. 240), which amended the Budget Act of 2021, allocated $7 million in ongoing General Fund support to develop a methodology for distributing funds to trial courts to cover the increased costs associated with the higher transcript rates.

Allocation Methodology

The Funding Methodology Subcommittee of the Trial Court Budget Advisory Committee (TCBAC) established the Ad Hoc Court Reporter Funding Subcommittee (ad hoc subcommittee), consisting of members from TCBAC, to develop an allocation methodology recommendation for the first year of funding in FY 2021–22. Through its deliberations, the ad hoc subcommittee developed a recommended methodology for allocating the $7 million and presented the recommendation to TCBAC at its meeting on November 30, 2021,[1] and to the Judicial Branch Budget Committee on December 7, 2021.[2] The Judicial Council approved the allocation

[1] Judicial Council of Cal., Staff Rep., *SB 170 Ongoing $7 Million Increased Transcript Rate Funding Allocation Methodology* (Nov. 30, 2021).
[2] Judicial Council of Cal., Staff Rep., *SB 170 Ongoing $7 Million Increased Transcript Rate Funding Allocation Methodology* (Dec. 7, 2021).

methodology at its business meeting on January 21, 2022, and directed staff to update the three-year average for the allocation methodology each year based on the most recent data available.[3]

The council-approved allocation methodology was developed to help courts cover increased transcript costs. Consistent with the annual budget bill language, the methodology provides for an equitable allocation of funds among all trial courts and includes the following components:

- Averaging actual transcript expenditures by court for the last three fiscal years based on the most recent data available (i.e., FY 2023–24, FY 2024–25, and FY 2025–26);
- Applying a proportional allocation of $7 million to each court based on the three-year average of transcript expenditures; and
- Allocating funds in one lump sum upon approval by the council.

On October 29, 2026, TCBAC approved the FY 2026–27 allocations for the $7 million to the trial courts, which are included as Attachment 2A.[4]

Annual True-Up Process

Because this funding is intended solely to cover the costs associated with increased transcript rates, any unspent funds are required to revert to the General Fund for each fiscal year. Each court's actual FY 2020–21 expenditures are used as a baseline for determining the cost increases eligible for reimbursement from these funds. Based on the historical baseline amount and the actual expenditures for the fiscal year, a true-up process will occur following the end of each fiscal year to pull back any remaining funds. An example of this process for FY 2026–27 is provided in Table 1 below.

Table 1. Annual Reversion Calculation for FY 2026–27

Court	A. FY 2020–21 Baseline	B. FY 2026–27 Allocation From $7M	C. FY 2026–27 Actual Expenditures	D. Difference (C − A = D)	E. General Fund Reversion (B − D = E)
Y	$85,000	$43,260	$120,000	$35,000	$8,260

In the Table 1 example, Court Y will receive an allocation of $43,260 from the FY 2026–27 court reporter transcript appropriation based on the existing methodology. At year-end, the court's actual expenditures for FY 2026–27 are $120,000, a $35,000 increase from the FY 2020–21 baseline amount ($120,000 − $85,000 = $35,000). Taking the difference between the FY 2026–27 allocation ($43,260) and the $35,000 increase ($43,260 − $35,000 = $8,260), the court will be required to revert the remaining $8,260 to the General Fund.

[3] Judicial Council of Cal., Advisory Com. Rep., *Allocations and Reimbursements to Trial Courts: SB 170 Funding for Increased Transcript Rates* (Jan. 21, 2022).
[4] Trial Court Budget Advisory Committee Meeting Materials (October 29, 2026), *Item 2 – Increased Transcript Rate Allocations for Fiscal Year 2026–27*.

Recommendation

Approve the FY 2026–27 allocation of the $7 million to each trial court using the council-approved methodology, which is based on the average transcript expenditures for the prior three fiscal years, as outlined in Attachment 2A.

This recommendation will be considered by the Judicial Council at its business meeting on December 11, 2026.

Attachments

1. Attachment 2A: Transcript Funding: Recommended FY 2026–27 Allocations

Attachment 2A: Transcript Funding: Recommended FY 2026–27 Allocations

Court	FY 2023–24 Actual Expenditures	FY 2024–25 Actual Expenditures	FY 2025–26 Actual Expenditures	3-Year Expenditure Average	Proportion of Average Expenditures Percentage	Proposed FY 2026–27 Proportional Allocation of $7M
Statewide	**$23,695,109**	**$25,246,096**	**$25,327,208**	**$24,756,137**	**100.00%**	**$7,000,000**
Alameda	503,353	452,023	478,700	478,025	1.93%	135,166
Alpine	141	335	0	159	0.00%	45
Amador	29,888	16,552	14,161	20,200	0.08%	5,712
Butte	111,183	99,163	108,559	106,302	0.43%	30,058
Calaveras	14,406	45,487	35,562	31,818	0.13%	8,997
Colusa	15,937	9,843	17,433	14,404	0.06%	4,073
Contra Costa	641,017	567,465	616,716	608,399	2.46%	172,030
Del Norte	34,221	31,719	19,288	28,409	0.11%	8,033
El Dorado	90,783	100,220	91,136	94,046	0.38%	26,592
Fresno	664,453	740,352	637,238	680,681	2.75%	192,468
Glenn	14,282	7,715	6,203	9,400	0.04%	2,658
Humboldt	4,528	5,077	3,758	4,454	0.02%	1,259
Imperial	41,292	59,192	44,021	48,168	0.19%	13,620
Inyo	12,614	20,673	12,776	15,354	0.06%	4,342
Kern	1,016,539	1,003,015	997,804	1,005,786	4.06%	284,394
Kings	360,009	279,146	273,285	304,147	1.23%	86,000
Lake	70,559	69,382	64,421	68,121	0.28%	19,262
Lassen	32,866	51,604	30,318	38,263	0.15%	10,819
Los Angeles	7,621,806	7,882,746	8,243,529	7,916,027	31.98%	2,238,321
Madera	131,650	97,177	95,307	108,045	0.44%	30,551
Marin	115,782	87,034	50,374	84,397	0.34%	23,864
Mariposa	10,631	11,188	14,656	12,158	0.05%	3,438
Mendocino	145,340	154,230	95,789	131,786	0.53%	37,264
Merced	159,871	153,581	181,319	164,924	0.67%	46,634
Modoc	8,534	12,567	22,614	14,572	0.06%	4,120
Mono	12,007	3,089	7,230	7,442	0.03%	2,104
Monterey	202,571	232,091	193,021	209,228	0.85%	59,161
Napa	126,090	106,344	137,636	123,357	0.50%	34,880
Nevada	69,669	59,369	63,684	64,241	0.26%	18,165
Orange	2,041,287	2,188,913	2,066,849	2,099,016	8.48%	593,514
Placer	338,621	362,939	295,469	332,343	1.34%	93,973
Plumas	7,655	11,107	11,499	10,087	0.04%	2,852
Riverside	21,906	24,815	20,606	22,442	0.09%	6,346
Sacramento	1,365,936	1,517,322	1,356,708	1,413,322	5.71%	399,628
San Benito	16,219	11,952	16,914	15,029	0.06%	4,249
San Bernardino	1,239,641	1,300,451	1,308,683	1,282,925	5.18%	362,758
San Diego	1,619,341	1,758,132	1,818,915	1,732,129	7.00%	489,774
San Francisco	683,834	754,970	871,155	769,986	3.11%	217,720
San Joaquin	391,653	465,572	471,579	442,935	1.79%	125,243
San Luis Obispo	233,587	220,404	287,430	247,140	1.00%	69,881
San Mateo	352,785	419,130	487,455	419,790	1.70%	118,699
Santa Barbara	216,414	269,186	330,485	272,029	1.10%	76,918
Santa Clara	619,864	693,031	817,729	710,208	2.87%	200,817
Santa Cruz	120,674	163,000	122,634	135,436	0.55%	38,296
Shasta	143,992	321,481	234,474	233,315	0.94%	65,972
Sierra	4,255	6,054	2,010	4,106	0.02%	1,161
Siskiyou	47,199	70,468	53,235	56,967	0.23%	16,108
Solano	311,808	297,882	393,625	334,438	1.35%	94,565

Attachment 2A: Transcript Funding: Recommended FY 2026–27 Allocations

Court	FY 2023–24 Actual Expenditures	FY 2024–25 Actual Expenditures	FY 2025–26 Actual Expenditures	3-Year Expenditure Average	Proportion of Average Expenditures Percentage	Proposed FY 2026–27 Proportional Allocation of $7M
Sonoma	179,551	187,194	200,290	189,012	0.76%	53,445
Stanislaus	289,909	387,675	304,147	327,244	1.32%	92,531
Sutter	26,777	41,349	36,879	35,002	0.14%	9,897
Tehama	18,294	50,315	23,785	30,798	0.12%	8,708
Trinity	4,835	3,975	2,825	3,878	0.02%	1,097
Tulare	382,105	495,772	450,622	442,833	1.79%	125,215
Tuolumne	76,426	105,205	100,163	93,931	0.38%	26,560
Ventura	367,552	410,332	414,996	397,627	1.61%	112,432
Yolo	256,306	299,862	218,324	258,164	1.04%	72,998
Yuba	54,661	49,228	51,186	51,692	0.21%	14,616

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Judicial Branch Budget Committee
(Action Item)

Title: Trial Court Budget Advisory Committee Annual Agenda for 2027

Date: 11/4/2026

Contact: Megan Ellis, Senior Fiscal Analyst, Judicial Council Budget Services | 916-263-2445 | megan.ellis@jud.ca.gov

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Issue

Consider the proposed annual agenda for the Trial Court Budget Advisory Committee for 2027. The annual agenda outlines the committee's priorities for the coming year and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources.

Background

Rule 10.64(a) of the California Rules of Court states the charge of the Trial Court Budget Advisory Committee is to make recommendations to the Judicial Council on the preparation, development, and implementation of the budget for trial courts and to provide input on policy issues affecting trial court funding.[1]

The annual agenda serves as the committee's work plan and the chair determines the projects and activities to include for the coming year. These projects include, but are not limited to, the following:

- Identify funding priorities for the trial courts to help guide the development of the annual judicial branch budget;
- Recommend allocation methodologies, including changes to existing methodologies, for funding adjustments included in the annual budget. These methodologies reflect the Workload Formula policy's core principles of funding equity, stability, and predictability; and
- Review trial court budget policies and procedures as needed.

The Judicial Branch Budget Committee oversees the Trial Court Budget Advisory Committee and is responsible for approving the annual agenda. The Judicial Branch Budget Committee may add or remove projects and adjust priorities as needed.

[1] California Rules of Court, rule 10.64(a), *Rule 10.64. Trial Court Budget Advisory Committee | Judicial Branch of California*.

The current 2026 annual agenda, approved by the Judicial Branch Budget Committee on November 13, 2025, is included as Attachment 3A.[2]

2027 Proposed Annual Agenda

The 2027 draft annual agenda identifies new, one-time, and ongoing projects and activities, and summarizes the committee's key accomplishments in 2026 (Attachment 3B). The projects are organized by priority level and aligned with *The Strategic Plan for California's Judicial Branch*.[3]

Recommendation

Approve the Trial Court Budget Advisory Committee's annual agenda for 2027.

Attachments

1. **Attachment 3A:** Trial Court Budget Advisory Committee, Annual Agenda 2026, Approved by Judicial Branch Budget Committee on November 13, 2025
2. **Attachment 3B:** Trial Court Budget Advisory Committee, Draft Annual Agenda—2027, For Approval by Judicial Branch Budget Committee: November 12, 2026

[2] Judicial Branch Budget Committee meeting materials (November 13, 2025), *Item 3 – Trial Court Budget Advisory Committee, Annual Agenda for 2026*.
[3] *The Strategic Plan for California's Judicial Branch*.

Trial Court Budget Advisory Committee
Annual Agenda[1]— January 1, 2026 – December 31, 2026
Approved by Judicial Branch Budget Committee on November 13, 2025

I. COMMITTEE INFORMATION

Chair:	Hon. Jonathan B. Conklin, Judge, Superior Court of Fresno County
Lead Staff:	Ms. Donna Newman, Manager, Judicial Council Budget Services

Advisory Body's Charge/Membership:

Rule 10.64(a) of the California Rules of Court states the charge of the Trial Court Budget Advisory Committee, which is to make recommendations to the Judicial Council on the preparation, development, and implementation of the budget for trial courts and provide input to the council on policy issues affecting trial court funding. Rule 10.64(b) sets forth additional duties of the advisory body.

Rule 10.64(c) sets forth the membership position of the advisory body. The Trial Court Budget Advisory Committee currently has 22 members. The current advisory body roster is available on the advisory body's webpage.

Subgroups of the Advisory Body[2]:

1. Fiscal Planning Subcommittee – Review annual recommendations for trial court requests, related to the fund balance cap as specified in Government Code section 77203, to set aside funds to be held on behalf of those courts in the Trial Court Trust Fund for specific projects. This subcommittee also reviews requests from trial courts related to Children's Waiting Room funding.
2. Funding Methodology Subcommittee – Ongoing review and refinement of the Workload Formula policy, evaluation of existing allocation methodologies and consideration of alternative allocation approaches for funding augmentations and reductions as needed based on the Workload Formula policy's core principles of funding equity, stability, and predictability to support trial court operations. Additionally, the subcommittee will develop methodologies for allocations from the Trial Court Trust Fund Court Interpreters Program (0150037) as needed or in the event of funding shortfalls.
3. Revenue and Expenditure Subcommittee – Ongoing review of Trial Court Trust Fund and State Trial Court Improvement and Modernization Fund allocations supporting trial court projects and programs, as well as any cash flow issues affecting the trial courts.

[1] The Annual Agenda outlines the work an advisory body will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources.
[2] For the definition of "subcommittee" see Cal. Rules of Court, rule 10.30(c); for "working group," see rule 10.70; for "workstream," see rule 10.53(c); and for "education curriculum committee," see rule 10.50(c)(6).

Advisory Body and Subgroup Meetings Planned for 2026[3]

Trial Court Budget Advisory Committee
January 2026/Remote Meeting; February 2026/Remote Meeting; May 2026/Remote Meeting; July 2026/Remote Meeting; October 2026/Remote Meeting

Funding Methodology Subcommittee
January 2026/Remote Meeting; April 2026/Remote Meeting; June 2026/Remote Meeting; September 2026/Remote Meeting

Fiscal Planning Subcommittee
October 2026/Remote Meeting

Revenue and Expenditure Subcommittee
April 2026/Remote Meeting

☐ Check here if in-person meeting is approved by the internal committee oversight chair.

[3] Refer to section IV. 2 (Meeting frequency) of the *Operating Standards for Judicial Council Advisory Bodies* for governance on in-person meetings. Note: Because of the current budget and staffing constraints, advisory body chairs and staff must first consider meeting remotely. The chair of the Executive and Planning Committee is extending the suspension of advisory body in-person meetings for the 2025−2026 annual agenda cycle. If an in-person meeting is needed, the responsible Judicial Council office head must seek approval from their advisory body's internal oversight committee chair. Please see the prioritization memo dated July 1, 2025, for additional details.

II. COMMITTEE PROJECTS

#	New or One-Time Projects	
1.	***Project Title:*** Workload Formula Equity-Based Reallocation Policy Updates	***Priority: 1***

Supported Strategic Plan Branch Goals:

I	II	III	IV	V	VI	VII
Access	*Independence*	*Modernization*	*Quality*	*Education*	*Infrastructure*	*Funding*
☒	☐	☐	☐	☐	☐	☒

Project Summary: The project originated from a new item added to the approved Funding Methodology Subcommittee's annual work plan for fiscal year (FY) 2025–26. The project is to clarify certain aspects of how the equity-based reallocation policy is interpreted and applied including, but not limited to, band penetration criteria and surplus reallocation funding. This clarification will improve transparency in budget planning and funding adjustments, and help courts anticipate and prepare for changes in their allocations. The equity-based reallocation was implemented for the first time in FY 2025–26.

In October 2025, the Funding Methodology Subcommittee initiated work on this project which will continue throughout FY 2025–26. At the conclusion of the project, the Trial Court Budget Advisory Committee will consider recommendations for potential updates to the Workload Formula policy. This project aligns with the policy's core principles of funding equity, stability, and predictability to support trial court operations.

Status/Timeline: New and one-time.

Fiscal Impact/Staff Resources: Judicial Council Budget Services staff.

☒ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: External stakeholders include the trial courts.

AC Collaboration: Judicial Branch Budget Committee.

#	New or One-Time Projects	
2.	***Project Title:*** Pretrial Release Program	***Priority: 1***
	Supported Strategic Plan Branch Goals: I *Access* ☒ · II *Independence* ☐ · III *Modernization* ☐ · IV *Quality* ☐ · V *Education* ☐ · VI *Infrastructure* ☐ · VII *Funding* ☒	
	Project Summary: Beginning in FY 2021–22, the budget included funding for the operation of ongoing court programs and practices that promote the safe, efficient, fair, and timely pretrial release of individuals booked into jail. The Budget Act of 2025 reduced the overall appropriation for the Pretrial Release Program by $5 million from $68.95 million to $63.95 million. In September 2025, the Judicial Council approved the FY 2025–26 pretrial release allocations of $63.95 million for the trial courts according to the methodology authorized in budget language. Additionally, the council directed staff to conduct a midyear survey and recommend a methodology for reallocating funding among the trial courts based on demonstrated need in the current year. The reallocation will maximize the use of available funding in FY 2025–26 to support program operations. ***Status/Timeline:*** New and one-time. ***Fiscal Impact/Staff Resources:*** Judicial Council Criminal Justice Services and Budget Services staff. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. ***Internal/External Stakeholders:*** External stakeholders include the trial courts. ***AC Collaboration:*** Judicial Branch Budget Committee.	
3.	***Project Title:*** Court-Appointed Juvenile Dependency Counsel Funding	***Priority: 1***
	Supported Strategic Plan Branch Goals: I *Access* ☒ · II *Independence* ☐ · III *Modernization* ☐ · IV *Quality* ☐ · V *Education* ☐ · VI *Infrastructure* ☐ · VII *Funding* ☒	
	Project Summary: In September 2025, the Judicial Council approved court-appointed counsel allocations of $186.7 million for FY 2025–26 for the trial courts. The council also directed the Trial Court Budget Advisory Committee to add an additional item to the Funding Methodology Subcommittee's FY 2025–26 work plan to consider a revised methodology to allocate funding for court-appointed juvenile dependency counsel to address unique challenges faced by the trial courts. Stakeholders have raised concerns that the existing methodology	

<table>
<tr><th>#</th><th>New or One-Time Projects</th></tr>
<tr><td></td><td>does not address the realities of current juvenile dependency practice. Trial courts have also noted concerns that the small court adjustment, which provides additional funding to smaller courts to help them meet minimum staffing and service standards despite having fewer cases, should be revisited to ensure it reflects current program needs. The revised allocation methodology is intended to improve outcomes in the dependency system.

Status/Timeline: New and one-time.

Fiscal Impact/Staff Resources: Judicial Council Center for Families, Children & the Courts and Budget Services staff.
☒ Check this box if this project may result in an allocation or distribution of funds to the courts.

Internal/External Stakeholders: External stakeholders include the trial courts and dependency providers.

AC Collaboration: Family and Juvenile Law Advisory Committee and Judicial Branch Budget Committee.</td></tr>
<tr><td>4.</td><td>Project Title: Sargent Shriver Civil Counsel Pilot Program</td><td>Priority: 1</td></tr>
<tr><td></td><td colspan="2">Supported Strategic Plan Branch Goals:

<table>
<tr><td>I
Access
☒</td><td>II
Independence
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Modernization
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Quality
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Education
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Infrastructure
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Funding
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</table>
Project Summary: In July 2025, the Judicial Council approved an $18.2 million Trial Court Trust Fund allocation for FY 2025–26 for the Sargent Shriver Civil Counsel Pilot Program. In October 2025, the council approved an augmentation of $1.4 million from program reserves to address the urgent need for legal aid services due to recent wildfires that caused widespread housing loss, in addition to cuts in federal funding. This resulted in a total program allocation of $19.6 million for FY 2025–26. In spring 2026, the Trial Court Budget Advisory Committee will consider recommendations from the Shriver Civil Counsel Act Implementation Committee for the FY 2026–29 grant cycle.

Status/Timeline: One-time.

Fiscal Impact/Staff Resources: Judicial Council Center for Families, Children & the Courts and Budget Services staff.
☒ Check this box if this project may result in an allocation or distribution of funds to the courts.

Internal/External Stakeholders: External stakeholders include the trial courts.

AC Collaboration: Shriver Civil Counsel Act Implementation Committee and Judicial Branch Budget Committee.</td></tr>
</table>

#	New or One-Time Projects	
5.	***Project Title:*** Trial Court Minimum Operating and Emergency Fund Balance Policy	***Priority: 1***
	Supported Strategic Plan Branch Goals: I *Access* ☒ · II *Independence* ☐ · III *Modernization* ☐ · IV *Quality* ☐ · V *Education* ☐ · VI *Infrastructure* ☐ · VII *Funding* ☒	
	Project Summary: The Judicial Council's trial court minimum operating and emergency fund balance policy was established in FY 2006–07 and requires trial courts to set aside a percentage of funds for use in emergency situations or due to budgetary shortfalls. The policy has been suspended by the council since FY 2012–13 due to changes in statute and to consider additional changes that would provide reserve funding for emergencies or unanticipated costs. The current suspension expires on June 30, 2026. In May 2024, the council directed the Funding Methodology Subcommittee to consider whether the policy should be repealed at a future time based on the current reserve options available to the courts including the $5 million state-level emergency reserve and 3 percent fund balance cap. In spring 2026, the Trial Court Budget Advisory Committee will consider recommendations to determine the impact of existing reserve funding on trial court operations and a potential repeal of the policy before the current suspension expires. ***Status/Timeline:*** New and one-time. ***Fiscal Impact/Staff Resources:*** Judicial Council Budget Services staff. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. ***Internal/External Stakeholders:*** External stakeholders include the trial courts. ***AC Collaboration:*** Judicial Branch Budget Committee.	
6.	***Project Title:*** Court Cluster System	***Priority: 2***
	Supported Strategic Plan Branch Goals: I *Access* ☒ · II *Independence* ☐ · III *Modernization* ☐ · IV *Quality* ☐ · V *Education* ☐ · VI *Infrastructure* ☐ · VII *Funding* ☒	
	Project Summary: The project originated from a Funding Methodology Subcommittee work plan item for FY 2020–21 to establish an ad hoc subcommittee to reevaluate the court cluster system and the impact of trial courts' placement in the Resource Assessment Study. The statewide four-cluster system is determined by the number of authorized judicial positions and is used in the Resource Assessment Study to determine court workload. In July 2023, the Trial Court Budget Advisory Committee approved updates to the Funding Methodology Subcommittee workplan, which referred the court cluster project to the Data Analytics Advisory	

#	New or One-Time Projects
	Committee will meet on November 4, 2025, to continue its evaluation of the system and will report its findings and recommendations to the Trial Court Budget Advisory Committee. ***Status/Timeline:*** One-time. ***Fiscal Impact/Staff Resources:*** Judicial Council Research, Analytics, and Data and Budget Services staff. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. ***Internal/External Stakeholders:*** External stakeholders include the trial courts. ***AC Collaboration:*** Data Analytics Advisory Committee and Judicial Branch Budget Committee.

#	Ongoing Projects and Activities	
1.	***Project Title:*** Funding Adjustments for Annual Governor's Budget, May Revision, and Enacted Budget	***Priority: 1***
	Supported Strategic Plan Branch Goals: I *Access* ☒ II *Independence* ☐ III *Modernization* ☐ IV *Quality* ☐ V *Education* ☐ VI *Infrastructure* ☐ VII *Funding* ☒	
	Project Summary: The Trial Court Budget Advisory Committee makes recommendations to the Judicial Council for funding adjustments included in the annual Governor's Budget, May Revision, and enacted budget. The committee will address funding proposals that impact the trial courts and collaborate with Judicial Council program offices, other advisory committees, and stakeholders, to implement budget proposals as needed. ***Status/Timeline:*** Ongoing. ***Fiscal Impact/Staff Resources:*** Judicial Council Budget Services staff. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. ***Internal/External Stakeholders:*** External stakeholders include the trial courts. ***AC Collaboration:*** Judicial Branch Budget Committee.	
2.	***Project Title:*** Workload Formula Policy and Allocations to Trial Courts	***Priority: 1***
	Supported Strategic Plan Branch Goals: I *Access* ☒ II *Independence* ☐ III *Modernization* ☐ IV *Quality* ☐ V *Education* ☐ VI *Infrastructure* ☐ VII *Funding* ☒	
	Project Summary: The Trial Court Budget Advisory Committee makes recommendations to the Judicial Council regarding annual allocations to the trial courts. For FY 2025–26, this included total allocations of $3.1 billion ($3 billion from the Trial Court Trust Fund and $117.8 million General Fund) based on recommended methodologies and the Workload Formula policy. The allocations were approved by the council at its July 2025 business meeting.	

#	Ongoing Projects and Activities
	The Trial Court Budget Advisory Committee will continue to make recommendations to the council on the preparation, development, and implementation of the budget for the trial courts and provide input on policy issues affecting trial court funding. This will include an ongoing evaluation of existing allocation methodologies and consideration of alternative allocation approaches based on the Workload Formula policy's goal of funding equity, stability, and predictability. The committee will continue to collaborate with other advisory committees including, but not limited to, the Court Executives Advisory Committee and the Data Analytics Advisory Committee on issues affecting the Workload Formula policy and trial court funding matters. ***Status/Timeline:*** Ongoing. ***Fiscal Impact/Staff Resources:*** Judicial Council Budget Services staff. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. ***Internal/External Stakeholders:*** External stakeholders include the trial courts. ***AC Collaboration:*** Court Executives Advisory Committee, Judicial Branch Budget Committee, and Data Analytics Advisory Committee.
3.	***Project Title:*** Workload Formula Policy Adjustment Request Process — ***Priority: 1***
	Supported Strategic Plan Branch Goals: I *Access* ☒ · II *Independence* ☐ · III *Modernization* ☐ · IV *Quality* ☐ · V *Education* ☐ · VI *Infrastructure* ☐ · VII *Funding* ☒
	Project Summary: In August 2013, the Judicial Council approved the Trial Court Budget Advisory Committee's recommendation to adopt the Workload Formula policy's adjustment request process to provide the trial courts with an annual opportunity to submit recommendations for changes to the policy as needed. The most recent requests were received in January 2025 from the Superior Court of Alameda County and the Superior Court of Stanislaus County. It was determined the proposals could impact the Resource Assessment Study, which calculates different caseweights to determine the workload-based funding need for the trial courts. In February 2025, the requests were referred to the Data Analytics Advisory Committee for review. The Data Analytics Advisory Committee will meet on November 4, 2025, to continue its evaluation of the requests and will report its findings and recommendations to the Trial Court Budget Advisory Committee. ***Status/Timeline:*** Ongoing.

#	Ongoing Projects and Activities
	Fiscal Impact/Staff Resources: Judicial Council Research, Analytics, and Data and Budget Services staff. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. ***Internal/External Stakeholders:*** External stakeholders include the trial courts. ***AC Collaboration:*** Data Analytics Advisory Committee and Judicial Branch Budget Committee.

III. LIST OF 2025 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	**Workload Formula Policy, State Trial Court Improvement and Modernization Fund, and Trial Court Trust Fund Allocations** The Trial Court Budget Advisory Committee made recommendations to the Judicial Council that included State Trial Court Improvement and Modernization Fund and Trial Court Trust Fund allocations for FY 2025–26 to support trial court programs and operations. In July 2025, the Judicial Council approved allocations totaling $46.6 million from the State Trial Court Improvement and Modernization Fund and an allocation of $3.1 billion ($3 billion from the Trial Court Trust Fund, $117.8 million General Fund, and an ongoing $55 million reduction to the trial courts' operational funding) included in the Budget Act of 2024.
2.	**Allocation for Partial Restoration of Trial Court Funding for FY 2024–25** In February 2025, the Judicial Council approved a recommendation from the Trial Court Budget Advisory Committee to partially restore $42 million of the $97 million reduction for trial court operations included in the Budget Act of 2024 beginning in FY 2024–25. This resulted in a revised $55 million ongoing reduction. The Judicial Council–approved methodology to allocate the $55 million reduction supports the Workload Formula policy's core principles of funding equity, stability, and predictability as higher funder courts took a larger share of the reduction than lower funded courts.
3.	**Workload Formula Allocation Methodologies for Potential Future Budget Reductions and Funding Restoration** In July 2025, the Judicial Council approved recommendations from the Trial Court Budget Advisory Committee to update the Workload Formula policy to include allocation methodologies to address future budget situations including (1) budget reductions, (2) funding restorations in the same fiscal year as the reduction occurred, and (3) funding restorations that occur in a future fiscal year following a reduction in a prior fiscal year. Having specific methodologies in the policy for these situations increases transparency regarding how funding is allocated to the trial courts so they can plan for changes in funding levels and the Judicial Council can address budget changes more efficiently going forward.
4.	**Community Assistance, Recovery, and Empowerment (CARE) Act** Beginning in FY 2022–23, the budget included funding to implement the CARE Act, a new court-based mental health services engagement and oversight program. The program was implemented in two cohorts of courts and all 58 courts had an operational program by December 2024. The Judicial Council approved a recommendation from the Trial Court Budget Advisory Committee to establish an allocation methodology using the Workload Formula policy to allocate CARE Act funding to all participating courts in FY 2023–24 and in subsequent years. In April 2025, the Judicial Council also approved the Trial Court Budget Advisory Committee's recommendation to reallocate unspent FY 2024–25 CARE Act funding to maximize the appropriation to support program needs.

#	Project Highlights and Achievements
5.	**Court Reporter Funding Reallocation** Beginning in FY 2021–22, the Judicial Council has approved recommendations from the Trial Court Budget Advisory Committee to allocate $30 million annually to the trial courts to increase the number of court reporters in family and civil law cases. In July 2024, the council directed staff to survey the courts for a one-time redistribution of unspent funds in FY 2024–25. In February 2025, the council approved a midyear reallocation of $820,000. The reallocation maximized the use of available funding to increase the number of court reporters in these case types.
6.	**Court Interpreter Funding Augmentation and Reallocation** In January 2023, the Judicial Council approved recommendations from the Trial Court Budget Advisory Committee to address funding shortfalls in the Court Interpreters Program. Shortages would first be covered by savings from courts with unspent funding up to the appropriation amount in the budget, and then Court Interpreters Program fund balance, if available, would be used. In FY 2024–25, the council approved an augmentation of $16.2 million from program reserves to address shortfalls in both FY 2023–24 and FY 2024–25. The council also approved a FY 2024–25 midyear reallocation of $510,000 of unspent funding to support interpreter services.
7.	**Trial Court Trust Fund Allocation Increase for Judicial Council Offices for FY 2024–25** In February 2025, the Judicial Council approved a recommendation from the Trial Court Budget Advisory Committee for an increase of $1.3 million to the FY 2024–25 allocation from the Trial Court Trust Fund for the Audit Services office to reflect funding included in the Budget Act of 2024 for required audits conducted by the State Controller's Office. The council also approved an increase of $150,000 to the FY 2024–25 allocation for the Budget Services office based on a reevaluation of budget workload for the collections program funded by the Trial Court Trust Fund. The increased allocations provided the necessary funding to the offices for the required activities.

Trial Court Budget Advisory Committee
Draft Annual Agenda[1]—2027
For approval by Judicial Branch Budget Committee November 12, 2026

I. COMMITTEE INFORMATION

Chair: Hon. Judith K. Dulcich
Lead Staff: Ms. Megan Ellis, Senior Fiscal Analyst, Judicial Council Budget Services

Advisory Body's Charge/Membership:

Rule 10.64(a) of the California Rules of Court states that the charge of the Trial Court Budget Advisory Committee is to make recommendations to the Judicial Council on the preparation, development, and implementation of the budget for trial courts and to provide input to the council on policy issues affecting trial court funding. Rule 10.64(b) sets forth additional duties of the advisory body.

Rule 10.64(c) sets forth the membership composition of the advisory body. The Trial Court Budget Advisory Committee currently has 20 members. The current advisory body roster is available on the advisory body's webpage.

Subgroups of the Advisory Body[2]:

1. Fiscal Planning Subcommittee – Review annual recommendations for trial court requests related to the fund balance cap, as specified in Government Code section 77203, to set aside funds to be held on behalf of those courts in the Trial Court Trust Fund for specific projects approved by the Judicial Council. This subcommittee also reviews requests from trial courts related to Children's Waiting Room funding.
2. Funding Methodology Subcommittee – Ongoing review and refinement of the Workload Formula policy, evaluation of existing allocation methodologies, and consideration of alternative allocation approaches for funding augmentations and reductions as needed based on the Workload Formula policy's core principles of funding equity, stability, and predictability to support trial court operations. Additionally, the subcommittee will develop methodologies for allocations from the Trial Court Trust Fund Court Interpreters Program as needed or in the event of funding shortfalls.
3. Revenue and Expenditure Subcommittee – Ongoing review of Trial Court Trust Fund and State Trial Court Improvement and Modernization Fund allocations supporting trial court projects and programs, as well as any cash flow issues affecting the trial courts.

[1] The Annual Agenda outlines the work an advisory body will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources.
[2] For the definition of "subcommittee" see Cal. Rules of Court, rule 10.30(c); for "working group," see rule 10.70.

Advisory Body and Subgroup Meetings Planned for 2027:

Trial Court Budget Advisory Committee

- January 2027 (Remote Meeting)
- March 2027 (Remote Meeting)
- May 2027 (In-Person)
- June 2027 (Remote Meeting)
- September 2027 (Remote Meeting)
- October 2027 (Remote Meeting)

Funding Methodology Subcommittee

- February 2027 (Remote Meeting)
- May 2027 (Remote Meeting)
- August 2027 (Remote Meeting)
- November 2027 (Remote Meeting)

Fiscal Planning Subcommittee

- October 2027 (Remote Meeting)

Revenue and Expenditure Subcommittee

- April 2027 (Remote Meeting)

☐ Check here if more than one in-person meeting is approved by the internal committee oversight chair.

II. COMMITTEE PROJECTS

Priority Levels and Branch Goals Key

Priority Levels for Non-Rules/Forms
1 – Must be done
2 – Should be done

Priority Levels for Rules/Forms Proposals
1a (Legal Compliance) – Proposal urgently needed to conform to or accurately reflect the law.

1b (Council Directive) – Council has directed the committee to consider new or amended rules and forms.

1c (Urgent Remedial Action) – Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public.

1d (Financial/ Legal Risk Mitigation) – Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk.

2a (Useful Changes in Law) – Useful, but not necessary, to implement changes in law.

2b (Responsive to Concerns) – Responsive to identified concerns or problems.

2c (Helpful Advancing Branch Goals) – Helpful in otherwise advancing Judicial Council goals and objectives

Judicial Branch Strategic Plan–Branch Goals

I. Access, Fairness, Diversity, and Inclusion
II. Independence and Accountability
III. Modernization of Management and Administration
IV. Quality of Justice and Service to the Public
V. Education for Branchwide Professional Excellence
VI. Branchwide Infrastructure for Service Excellence
VII. Adequate, Stable, and Predictable Funding for a Fully Functioning Branch

New or One-Time Projects

1. ***Project Title*: New Judgeship Funding**

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☐	☐	☐	☐	☒

Project Summary:
The Budget Act of 2026 includes $99.9 million to begin funding 13 of the 26 judgeships authorized by Senate Bill 75 (Stats. 2023, ch. 482) over the next five fiscal years. This funding includes $1.5 million ($1.3 million for trial courts, $201,000 for compensation to superior court judges, and $62,000 for court interpreters) for the operational costs associated with three judgeships beginning in the last quarter of the fiscal year, and $98.4 million for facility construction and modifications to support the judgeships. The Funding Methodology Subcommittee will develop an allocation methodology for the $1.3 million for the first year of operational costs.

Status/Timeline: One-Time.

Fiscal Impact/Staff Resources: Judicial Council Budget Services staff.

☒ Check this box if this project may result in an allocation or distribution of funds to the courts.

Internal/External Stakeholders: External stakeholders include the trial courts.

AC Collaboration: Judicial Branch Budget Committee.

2. ***Project Title*: Workload Formula Equity-Based Reallocation Policy Updates**

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☐	☐	☐	☐	☒

Project Summary:
Evaluate the Workload Formula equity-based reallocation policy, including technical refinements and clarifications to the existing methodology. The project will clarify certain aspects of how the equity-based reallocation policy is interpreted and applied, including, but not limited to, band penetration criteria and surplus reallocation funding. This will improve transparency in budget planning and funding adjustments and help courts anticipate and prepare for changes in their allocations.

The equity-based reallocation was implemented for the first time in fiscal year (FY) 2025–26. In October 2025, the Funding Methodology Subcommittee initiated work on this project, which will continue in FY 2026–27. The Trial Court Budget Advisory Committee will consider recommendations for potential updates to the Workload Formula policy. This project aligns with the policy's core principles of funding equity, stability, and predictability to support trial court operations.

Status/Timeline: One-Time.

Fiscal Impact/Staff Resources: Judicial Council Budget Services staff.

☒ Check this box if this project may result in an allocation or distribution of funds to the courts.

Internal/External Stakeholders: External stakeholders include the trial courts.

AC Collaboration: Judicial Branch Budget Committee.

3. ***Project Title*: Court-Appointed Juvenile Dependency Counsel Funding**

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☐	☐	☐	☐	☒

Project Summary:
In September 2025, the Judicial Council directed the Trial Court Budget Advisory Committee to consider a revised methodology to allocate the annual appropriation for court-appointed juvenile dependency counsel to address unique challenges faced by the trial courts, and to add this project to the Funding Methodology Subcommittee's annual work plan. Trial courts and stakeholders have raised concerns that the existing methodology does not address the realities of current juvenile dependency practice and program needs. The Trial Court Budget Advisory Committee authorized a working group to review the current allocation methodology, including input from external stakeholders and dependency providers. Recommendations from the working group will be presented to the Funding Methodology Subcommittee. Within the program's available funding, the revised allocation methodology is intended to improve outcomes in the dependency system.

Status/Timeline: One-Time.

Fiscal Impact/Staff Resources: Judicial Council Budget Services and Center for Children, Families & the Courts staff.

☒ Check this box if this project may result in an allocation or distribution of funds to the courts.

Internal/External Stakeholders: External stakeholders include the trial courts.

AC Collaboration: Judicial Branch Budget Committee.

4. ***Project Title*: Court Cluster System**

Priority: 2

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☐	☐	☐	☐	☒

Project Summary:
The statewide four-cluster system is determined by the number of authorized judicial positions and is used in the Resource Assessment Study to determine court workload. This project will reevaluate the court cluster system and assess the impact of trial courts' cluster placement in the Resource Assessment Study. In July 2023, the Trial Court Budget Advisory Committee approved updates to the Funding Methodology Subcommittee work plan and referred the court cluster project to the Data Analytics Advisory Committee. This project is included in the Data Analytics Advisory Committee's annual agenda for 2027.

Status/Timeline: One-Time.

Fiscal Impact/Staff Resources: Judicial Council Research, Analytics, and Data and Budget Services staff.

☒ Check this box if this project may result in an allocation or distribution of funds to the courts.

Internal/External Stakeholders: External stakeholders include the trial courts.

AC Collaboration: Data Analytics Advisory Committee and Judicial Branch Budget Committee.

5. *Project Title*: Impact of Bureau of Labor Statistics Factor and Operating Expenses and Equipment on the Workload Formula Calculation.

Priority: 2

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☐	☐	☐	☐	☒

Project Summary:
This project, which is included in the Funding Methodology Subcommittee's work plan for FY 2026–27, will evaluate the impact of the Bureau of Labor Statistics factor on the Workload Formula calculation. Additionally, the subcommittee will evaluate the application of operating expenses and equipment costs in the methodology to ensure that regional cost differences for goods and services across the state are appropriately reflected in the model.

Status/Timeline: One-Time.

Fiscal Impact/Staff Resources: Judicial Council Research, Analytics, and Data and Budget Services staff.

☒ Check this box if this project may result in an allocation or distribution of funds to the courts.

Internal/External Stakeholders: External stakeholders include the trial courts.

AC Collaboration: Data Analytics Advisory Committee and Judicial Branch Budget Committee.

Ongoing Projects and Activities

1. ***Project Title*: Funding Adjustments for Annual Governor's Budget, May Revision, and Enacted Budget**

   Priority: 1

   Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☐	☐	☐	☐	☒

   Project Summary:
   The Trial Court Budget Advisory Committee makes recommendations to the Judicial Council for funding adjustments included in the annual Governor's Budget, May Revision, and enacted budget. The committee will address funding proposals that impact the trial courts and collaborate with Judicial Council program offices, other advisory committees, and stakeholders to implement budget proposals as needed.

   Status/Timeline: Ongoing.

   Fiscal Impact/Staff Resources: Judicial Council Budget Services staff.

   ☒ Check this box if this project may result in an allocation or distribution of funds to the courts.

   Internal/External Stakeholders: External stakeholders include the trial courts.

   AC Collaboration: Judicial Branch Budget Committee.

2. ***Project Title*: Workload Formula Policy and Allocations to Trial Courts**

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☐	☐	☐	☐	☒

Project Summary:
The Trial Court Budget Advisory Committee makes recommendations to the Judicial Council regarding annual allocations to the trial courts. The Trial Court Budget Advisory Committee will continue to make recommendations to the council on the preparation, development, and implementation of the budget for the trial courts and to provide input on policy issues affecting trial court funding. This will include an ongoing evaluation of existing allocation methodologies and consideration of alternative allocation approaches based on the Workload Formula policy's core principles of funding equity, stability, and predictability. The committee will continue to collaborate with other advisory committees including, but not limited to, the Court Executives Advisory Committee and the Data Analytics Advisory Committee on issues affecting the Workload Formula policy and trial court funding matters.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: Judicial Council Budget Services staff.

☒ Check this box if this project may result in an allocation or distribution of funds to the courts.

Internal/External Stakeholders: External stakeholders include the trial courts.

AC Collaboration: Data Analytics Advisory Committee, Court Executives Advisory Committee, and Judicial Branch Budget Committee.

3. ***Project Title*: Workload Formula Policy Adjustment Request Process**

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☐	☐	☐	☐	☒

Project Summary:
The Judicial Council's Workload Formula policy is used to allocate certain funding to the trial courts based on workload measures. The policy includes an annual adjustment request process that allows the trial courts to propose changes to the methodology when workload-related factors are identified that are not currently accounted for in the model but are essential to court operations.

The January 2025 Workload Formula policy adjustment request from the Superior Court of Alameda County was referred to the Data Analytics Advisory Committee for evaluation due to potential implications for Resource Assessment Study assumptions. In September 2026, the Data Analytics Advisory Committee completed its review of Alameda's request and recommended that the Trial Court Budget Advisory Committee consider a supplemental Resource Assessment Study calculation to account for staffing needs associated with authorized judgeships. This item remains open pending the Trial Court Budget Advisory Committee's review. There are no other open adjustment requests at this time, and the next submission cycle is in January 2027.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: Judicial Council Budget Services.

☒ Check this box if this project may result in an allocation or distribution of funds to the courts.

Internal/External Stakeholders: External stakeholders include the trial courts.

AC Collaboration: Data Analytics Advisory Committee and Judicial Branch Budget Committee.

III. LIST OF 2026 PROJECT ACCOMPLISHMENTS

Project Highlights and Achievements

1. Workload Formula, State Trial Court Improvement and Modernization Fund, and Trial Court Trust Fund Allocations

The Trial Court Budget Advisory Committee made recommendations to the Judicial Council that included State Trial Court Improvement and Modernization Fund and Trial Court Trust Fund allocations for FY 2026–27 to support trial court programs and operations. On July 17, 2026, the Judicial Council approved allocations totaling $47.8 million from the State Trial Court Improvement and Modernization Fund for trial court programs and services and an allocation of $3.2 billion for court operations, including $3.1 billion from the Trial Court Trust Fund and $117.8 million General Fund.

2. Pretrial Release Program Augmentation

The Budget Act of 2026 included $68.9 million for the Pretrial Release Program, of which $48.9 million was approved by the Judicial Council in July 2026. In August 2026, the Judicial Council approved recommendations from the Trial Court Budget Advisory Committee to allocate the remaining $20 million for FY 2026–27. This funding will help maintain access to critical pretrial services and support the continued operation of local pretrial release programs throughout the state.

3. Allocation of Additional Funding for Proposition 36

The Budget Act of 2025 included an initial $20 million one-time General Fund, of which $19 million was allocated for the courts to begin implementation activities. The Budget Act of 2026 included an additional $10 million one-time General Fund to support the increased workload for Proposition 36 and expand or establish collaborative courts. Of this amount, $9.5 million is for the trial courts and $500,000 is for the Judicial Council's administrative costs. The Trial Court Budget Advisory Committee recommended an allocation methodology for FY 2026–27, which will be considered by the Judicial Council at its business meeting on December 11, 2026.

4. Involuntary Medication Orders (SB 820) Allocations for Fiscal Year 2026–27

The Budget Act of 2026 included $4.3 million General Fund annually for four years, beginning FY 2026–27 through FY 2029–30, for the trial courts to implement the new responsibilities and workload required by SB 820. SB 820 creates an alternative process to allow involuntary medication of individuals who are confined in the county jail and have been found incompetent to stand trial after being charged with a misdemeanor. The Trial Court Budget Advisory Committee recommended an allocation methodology for FY 2026–27 that was approved by the Judicial Council at its business meeting on October 16, 2026.

5. Workload Formula Policy Base Funding Floor Adjustment

The Trial Court Budget Advisory Committee recommended changes to the Workload Formula policy's base funding floor adjustment by treating the base funding floor amount as a minimum floor rather than a ceiling. This change will allow the floor courts to retain their full Workload Formula allocation in years when the calculation exceeds the floor and help ensure they have sufficient resources to meet

essential operational needs and maintain minimum staffing levels. The recommendation was approved by the Judicial Council at its business meeting on October 16, 2026.

6. Court-Appointed Juvenile Dependency Counsel Allocations for Fiscal Year 2026–27

The Trial Court Budget Advisory Committee recommended incorporating court spending plans to ensure the funding is maximized to serve children and families in dependency proceedings for court-appointed juvenile dependency counsel for FY 2026–27. A court-appointed juvenile dependency counsel spending plan survey conducted in May 2026 identified $520,000 available for reallocation to other courts. The $520,000 was first allocated to small courts impacted by funding reductions to help them adjust to FY 2026–27 reductions, with any remaining funding allocated to large courts to offset reductions for the small court adjustments. Based on this methodology, $185,561 was allocated to small courts and $334,439 to large courts.

7. Closed Workload Formula Policy Adjustment Request Process Submissions

Three Workload Formula policy adjustment request submissions were closed in 2026. The 2025 Workload Formula policy adjustment request from the Superior Court of Stanislaus County was referred to the Data Analytics Advisory Committee for evaluation. The Data Analytics Advisory Committee concluded that the proposal did not warrant changes to the existing methodology, and the item was closed in January 2026. Two 2026 Workload Formula policy adjustment requests from the Superior Court of San Francisco County were referred to the Funding Methodology Subcommittee for evaluation. In September 2026, the subcommittee determined that neither request should move forward for further consideration, and both items are closed.

8. Court Interpreter Funding Augmentation and Reallocation

In January 2023, the Judicial Council approved recommendations from the Trial Court Budget Advisory Committee to address funding shortfalls in the Court Interpreters Program by using Trial Court Trust Fund restricted fund balance designated for the program. Shortages would first be covered by savings from courts with unspent funding up to the appropriation amount in the budget, and then Court Interpreters Program fund balance, if available, would be used. In FY 2025–26, the council approved an augmentation of $19.1 million from the Trial Court Trust Fund to support interpreter services. This augmentation was subsequently approved by the Department of Finance and the Legislature.